

Gender Budgeting

Examples of integrating gender equality as a horizontal principle in policy objectives and specific objectives

Hypothetical case study: addressing identified gender equality gaps in an OP

In southern Europe, a fictional country's context analysis identified the potential to increase women's presence in small and medium-sized enterprises (SMEs).

When the state's managing authorities developed their PA, they chose policy objective 1, 'A smarter Europe by promoting innovative and smart economic transformation' as one of their priorities. They selected the specific objective of: 'enhancing growth and competitiveness of SMEs', with the output "SMEs supported to create jobs and growth for both women and men.'

Within this output, the managing authorities developed further information, referring to the context analysis and the aim of increasing women's role in SMEs, as both entrepreneurs and employees. Therefore, the OP's implementation paid specific attention to boosting women's share in SMEs, particularly in business start-ups. Accordingly, a specific budget was allocated to this end.

As women in the country were under-represented in business start-ups and as SME owners, programmes targeting SMEs and social enterprises were found wanting: they were addressing relevant issues insufficiently to meaningfully increase women's engagement in SMEs.

Services were needed that specifically target women, such as access to credit, training and coaching on managing businesses, and care services and innovative ICT services to support work-life balance for both women and men, – such as ICT-supported interventions for providing care for older persons and other forms of social care. SME development could cut across ESF and ERDF actions to address the complexity of combining paid work with and unpaid care responsibilities, while enhancing women’s engagement in training programmes and access to paid work. For instance, training was offered in the identified sectors and professions where women are predominantly active, as were interventions to simultaneously address men’s under-representation in care work, both paid and unpaid. In tandem, specific support activities were developed to aid women entrepreneurs to develop business plans, access credit, and set-up their own businesses. These initiatives were rolled out both in sectors traditionally dominated by women and in sectors usually dominated by men.

Regular sex-disaggregated monitoring was undertaken to assess the support provided, beneficiaries’ needs, the progress of business start-ups, access to credit, the size of businesses, and indicators related to success and survival. This monitoring contributed to correcting gender biases during programme implementation. For example, the average (guaranteed) credit allocated to men was found to be higher than that available to women, whereas the business default rate after 1 year was higher among male-owned businesses than female-owned start-ups.

A better, more gender-aware selection process contributed to advancing the programme's aims of increasing the proportion of women-owned businesses. Furthermore, greater availability of care services boosted women’s employment rates following specific training.

This was because women’s time availability increased, making them more attractive as employees, as they were able to enter full-time employment.

Germany: Lower Saxony considers the lived realities of women and men

The German federal state of Lower Saxony (Niedersachsen) developed a common monitoring platform to monitor progress on horizontal principles, including gender equality, across all EU Funds.

The overall aim of this initiative is to coordinate and steer EU Funds' programme activities so that they reduce existing inequalities between women and men.

Regular, intensive exchange is fostered between the funds, such as the EAFRD and the multifund ERDF/ESF OP, and the central coordinating authority. Measures to advance gender equality, and the management of calls and applications to do so, are actively supported.

As part of this initiative, a pilot project was implemented in Lower Saxony by the managing authorities of the multifund ERDF/ESF OP and the EAFRD, together with members of the respective steering groups. The pilot project coordinated exchanges regarding progress on the horizontal principles, especially gender equality. It included actions to make communication gender-sensitive, while ensuring that data considering the lived realities of women and men were collected and reported to the monitoring committee. Central coordination activities between the EAFRD and the multifund ERDF/ESF OP involved ongoing discussions on evaluation findings related to equal opportunities for women and men.

One important output of these coordination activities was the attention paid to the effects that funding disbursement may have on advancing gender equality, such as the need to avoid approving funding that could potentially contribute to, or maintain, negative structural disadvantages for women.

The coordinating activities have also fed into the funds' programming for the post-2020 period.

Within the multifund ERDF/ESF OP, gender mainstreaming is thoroughly anchored in all phases of the programme, from programming through steering and implementation, to monitoring. Guides are published to promote gender mainstreaming, alongside the principle of equal opportunities. This has further advanced gender equality in project implementation. Funding is also allocated to target women and men specifically, with approximately 50% of all funding targeting women. Throughout, gender-sensitive indicators are used, while data is collected and monitored. As a result, a broad range of measures exist to advance gender equality across the OP's individual priority axes, with particular concentrations along relevant priority axes (primarily priority axes 6 and 8). This also ensures that horizontal principles are anchored in programme evaluations.